

## METHOD AND SYSTEM FOR COLLABORATING ADVISORS

### Abstract

5           The present invention provides a common collaboration tool to interact, communicate  
and serve a client in a coordinated manner in various areas of interest. The present invention  
enables a client to authorize selected advisors as well as other participants to view, discuss,  
modify and perform other operations in response to the client's request for services. A client  
may define the scope of authorization for advisors and/or other participants for security and  
confidentiality reasons. Advisors (and/or participants) may access information submitted (or  
authorized) by the client to collaborate as a cohesive team in sharing information, devising a  
plan, addressing client's concern, drafting (or modifying) a document and performing other  
services for the client. The present invention provides a mechanism to implement planning in  
an organized and efficient manner, by promoting consistent and accurate collaboration of  
15 resources, tools and efforts.

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